

SkyVisualEditor

Salesforce1 Support Guide

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TerraSky co., Ltd.

Table of Contents

1. Preface	3
2. Notice	3
(1) Request to the customer	3
(2) Trademarks.....	3
3. How to use in a Salesforce1 application	4
(1) Action to take in SkyVisualEditor	4
(2) Salesforce Settings	4
a. Navigation through Visualforce Tabs.....	5
b. Using Publisher Actions, Global Actions.....	6
c. Using mobile cards on the related information page.....	8
d. Overriding standard buttons and using custom buttons and custom links.....	9
e. Placing in the record details page layout.....	9
(3) Creating the pages	10
a. Differences from Browser (Full Site) display	10
i. Help text and tool tip display.....	10
ii. Multiselect Picklists.....	11
iii. Related Lists	12
iv. Details Panel component	12
v. Custom Lookup template pages	13
vi. Fixed Table headers	14
vii. Page Assignment template pages.....	14
viii. JavaScript page navigation	14
ix. Navigation Destination.....	15
b. Screen Development Points	18
i. Using Date Fields	18
ii. Displaying fields as links	18
iii. Screen size on Android devices	18
iv. To use Data Table in Free Layout.....	19
v. Required field does not get marked as required when placed directly on under the canvas.	19
vi. Unable to display PDF pages on mobile device.	19

1. Preface

With SkyVisualEditor it is possible to develop Salesforce1 Application pages in the same way it is possible to make pages for the existing browser (full site). Such as Salesforce, the scope of supported functionality depends on the device, browser and application.

Device		Browser, Application
PC		Browser (Chrome™)
Mobile	iPad, iPhone	Salesforce1 App, Browser (Safari ®)
	Android	Salesforce1 App, Browser (Chrome™)

※ For a list of devices and browsers that are officially supported by Salesforce, please refer to the following page.

http://help.salesforce.com/apex/HTViewHelpDoc?id=sf1_requirements.htm

2. Notice

(1) Request to the customer

Unauthorized reproduction of this manual is forbidden. Although every attempt has been made to ensure quality of this manual, if you find any problems or errors please let us know. Any applications made as a result of using this manual are used and published under the responsibility of the creating user. Use the contents of this manual at your own risk. TerraSky cannot be held responsible for any trouble, lawsuit, etc. resulting either directly or indirectly from the use of this manual. We reserve the right to update this manual at any time without warning.

(2) Trademarks

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3. How to use in a Salesforce1 application

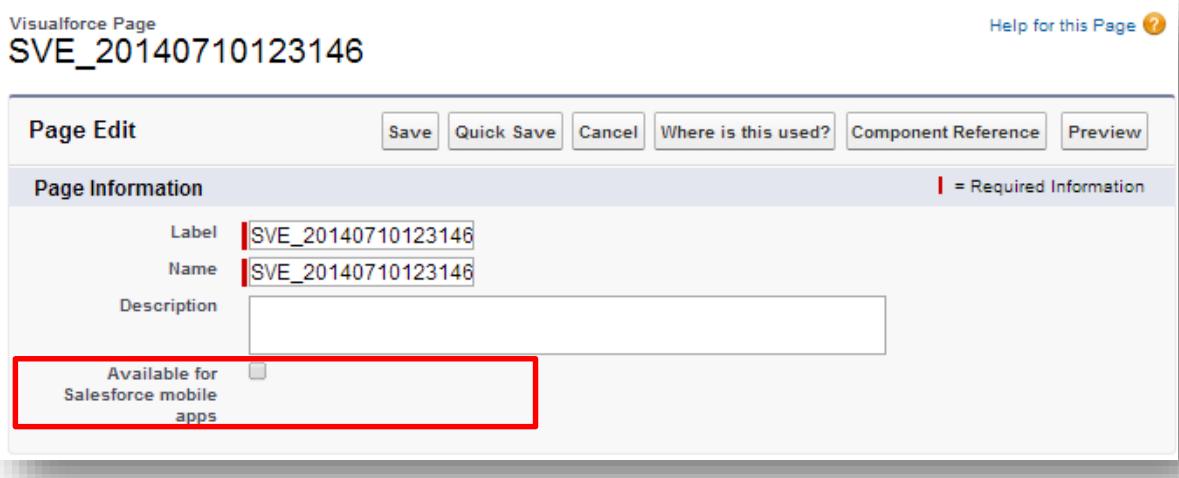
The follow sections describe how to use pages made with SkyVisualEditor in a Salesforce1 application.

(1) Action to take in SkyVisualEditor

For pages to work in Salesforce1, they need to have been deployed from SkyVisualEditor version 3.5 or newer (released 2014/7/13). If you would like to use a page deployed on a version of SkyVisualEditor prior to V3.5, please upgrade your SkyVisualEditor package and redeploy the page.

(2) Salesforce Settings

After being deployed, pages need to have the “Available for Salesforce mobile apps” property enabled. You can enable this property from [Setup]->[Develop]->[Pages]->The Visualforce page you want to use in Salesforce1.



The screenshot shows the 'Page Edit' screen for a Visualforce page named 'SVE_20140710123146'. The 'Page Information' section includes fields for Label (set to 'SVE_20140710123146'), Name (set to 'SVE_20140710123146'), and Description (empty). A checkbox labeled 'Available for Salesforce mobile apps' is present, and it is highlighted with a red rectangular box. Other buttons at the top include Save, Quick Save, Cancel, Where is this used?, Component Reference, and Preview.

After you have set a page to be available for Salesforce mobile apps, you can use the page from a Salesforce1 application in one of the below methods.

- [a. Navigation through Visualforce Tabs](#)
- [b. Using Publisher Actions, Global Actions](#)
- [c. Using mobile cards on the related information page](#)
- [d. Overriding standard buttons and using custom buttons and custom links](#)
- [e. Placing in the record details page layout](#)

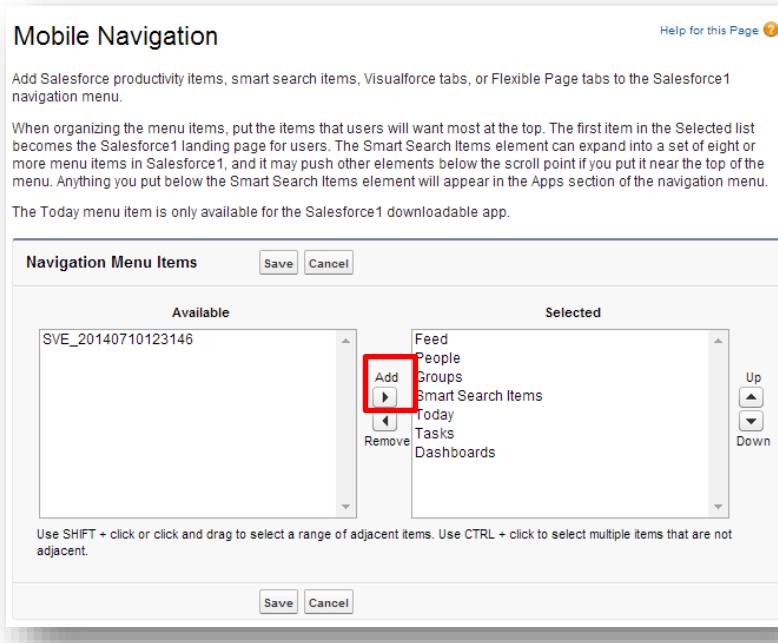
Salesforce Help: Enabling Visualforce pages for Salesforce1 Applications

https://help.salesforce.com/HTViewHelpDoc?id=customize_sf1_visualforce.htm&language=en

a. Navigation through Visualforce Tabs

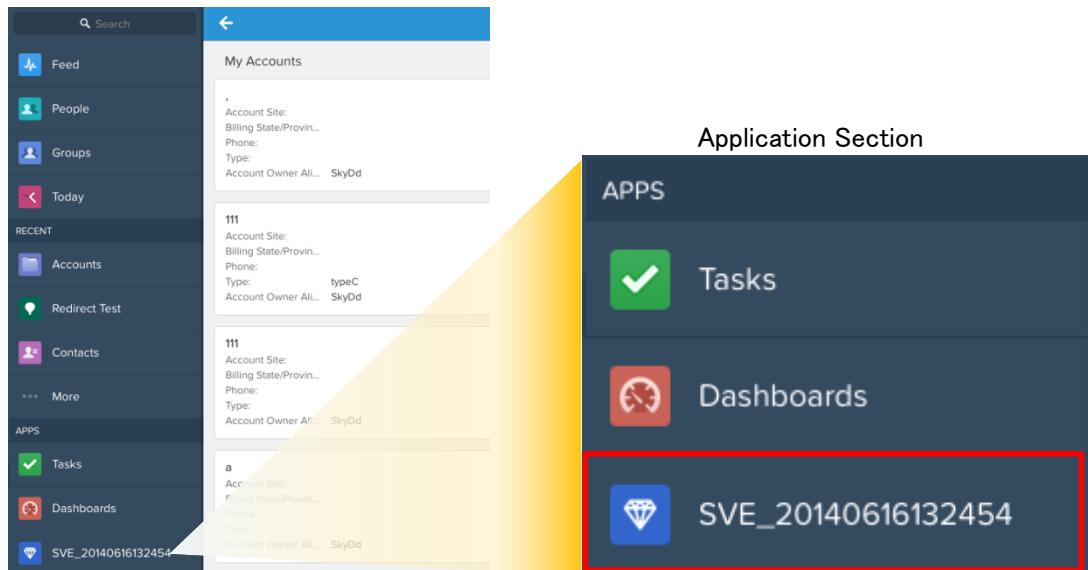
If your Visualforce page created with SkyVisualEditor is set as a tab, we will add that Visualforce Page Tab to the mobile navigation menu.

[Setup]->[Administer]->[Mobile Administration]->[Mobile Navigation]



Select the application page from the Available list and click the Add button to move the page to the Selected list. Click the Save button.

Visualforce page tabs that are added to the mobile navigation list will be added to the Application section of the Salesforce1 navigation menu.

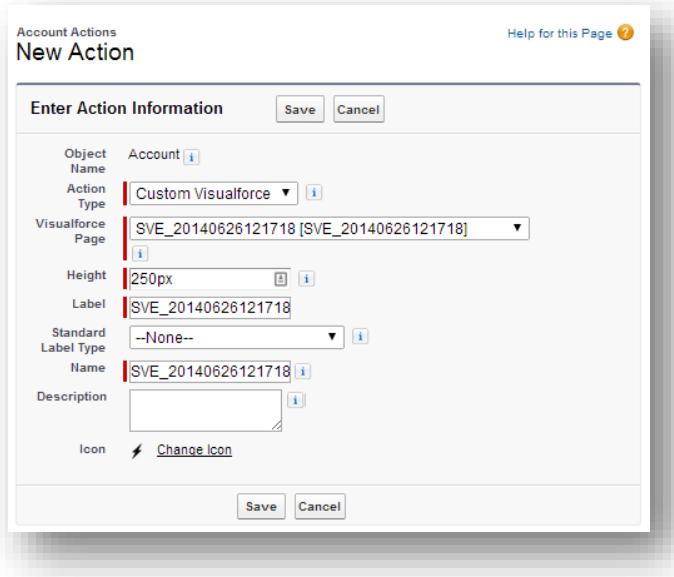


b. Using Publisher Actions, Global Actions

You can add custom actions that make use of a Visualforce page created by SkyVisualEditor that can be used as publisher actions that are shown upon tapping the  button and as global actions.

1) Create a custom action

Action Type: Custom Visualforce



<For standard objects>

[Setup]->[Customize]->[Target Object]->[Buttons, Links, and Actions]->New Action

<For custom objects>

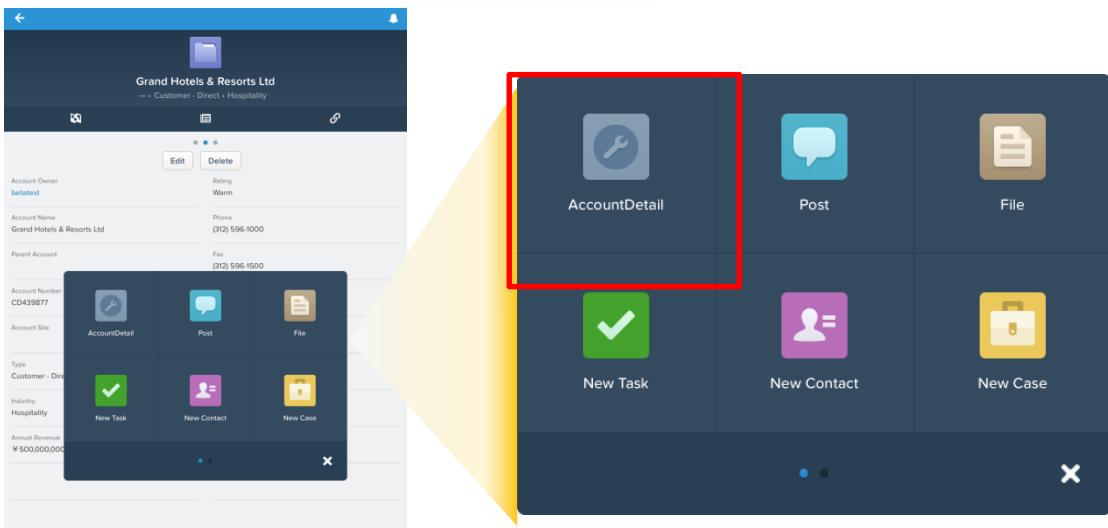
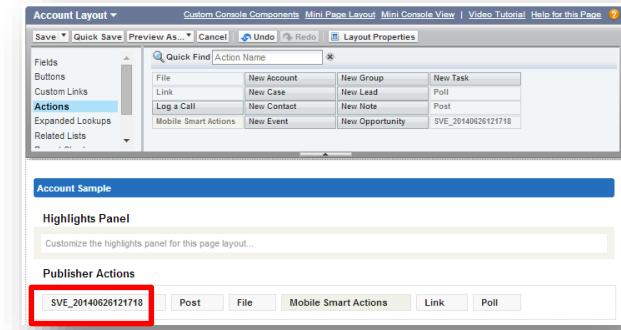
[Setup]->[Create]->[Objects]->[Target Object]->[Buttons, Links, and Actions]->New Action

<For a global action>

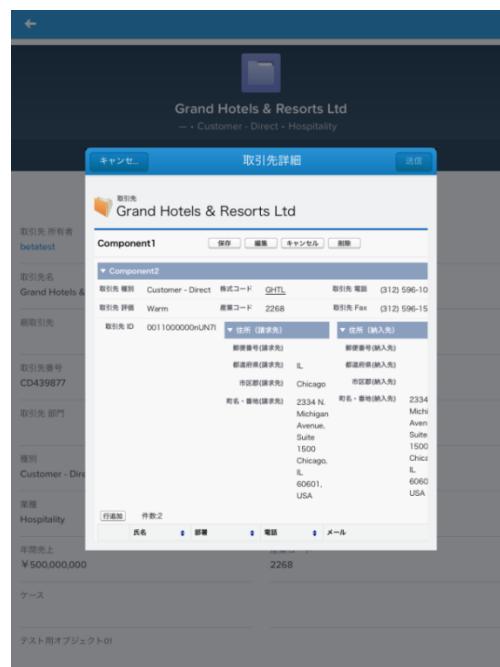
[Setup]->[Create]->[Global Actions]->New Action

2) Add to the page layout

Add the publisher action to the page layout.

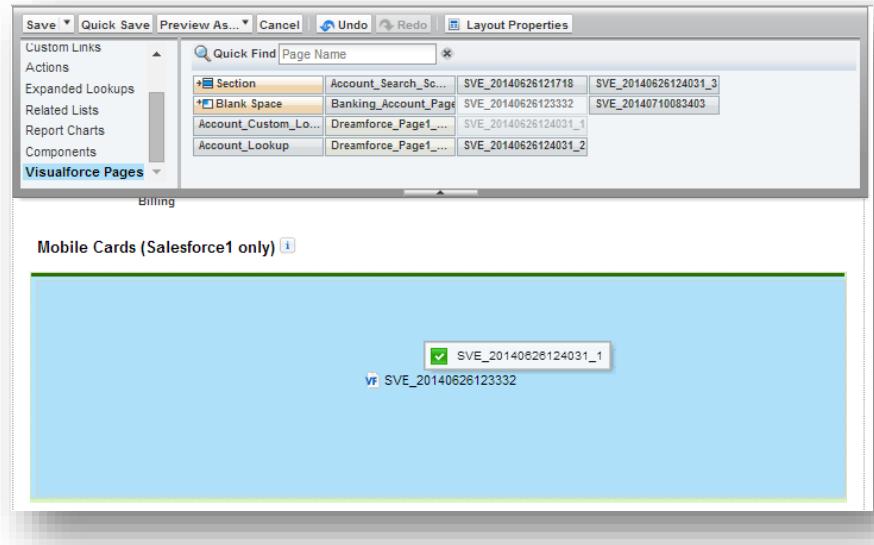


After clicking on the added publisher action icon, the set Visualforce page will be displayed.

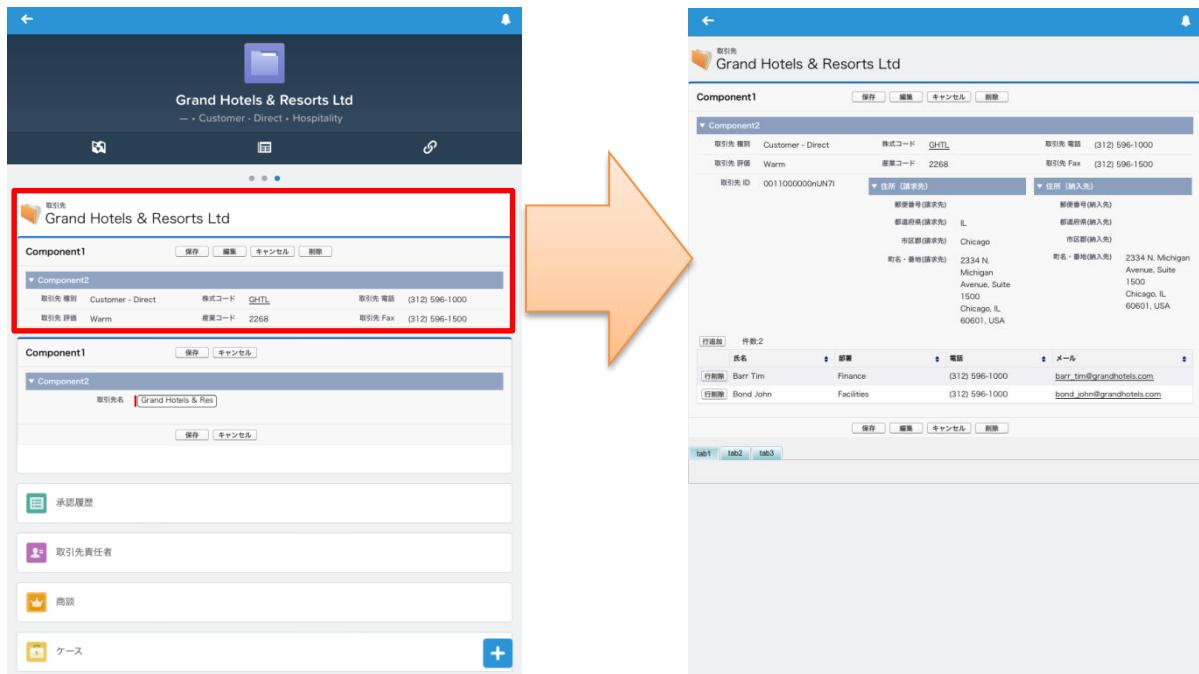


c. Using mobile cards on the related information page

By setting a Visualforce page made with SkyVisualEditor as a “Mobile Card” on the page layout, you can display the record details screen as a Visualforce page for a Salesforce1 object.



Upon doing so, when tapping the mobile card from the page layout, the system will transition to the Visualforce page.



d. Overriding standard buttons and using custom buttons and custom links

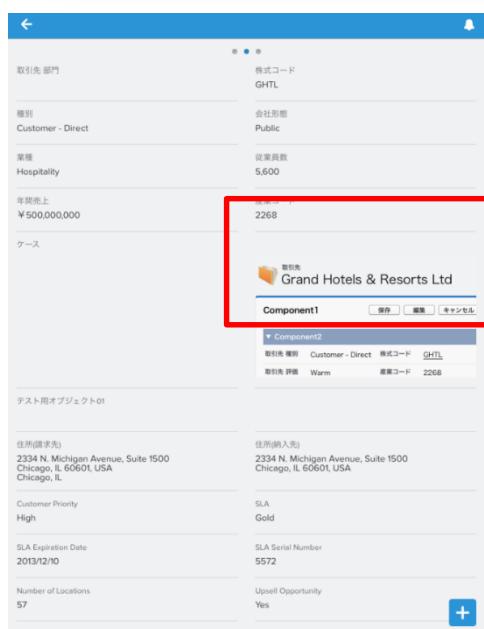
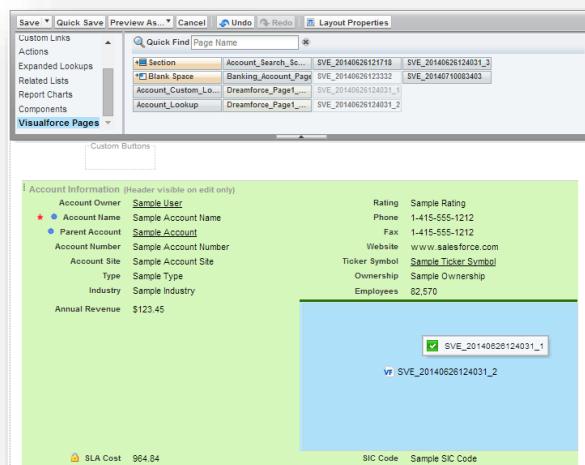
Please refer to section 4, 4-12, 2, iii “Override default Salesforce buttons” (p.293) of the SkyVisualEditor user manual.

https://www.skyvisualeditor.com/help/skyvisualeditor_help_en.pdf

e. Placing in the record details page layout

It is also possible to display a Visualforce page embedded in a page layout on the Salesforce1 details page for a record.

When tapping on the Visualforce page of the record details screen, the system will navigate to the appropriate Visualforce page.



(3) Creating the pages

a. Differences from Browser (Full Site) display

In general, Visualforce pages running as Salesforce1 applications can be used the same as pages running in a browser but we make special mention of a few areas that differ.

This chapter uses the terminology [Full site display] and [Salesforce1 display] as follows:

- ✓ [Full site display]…The existing browser screen
- ✓ [Salesforce1 display]…Salesforce1 screen running on the Salesforce1 application

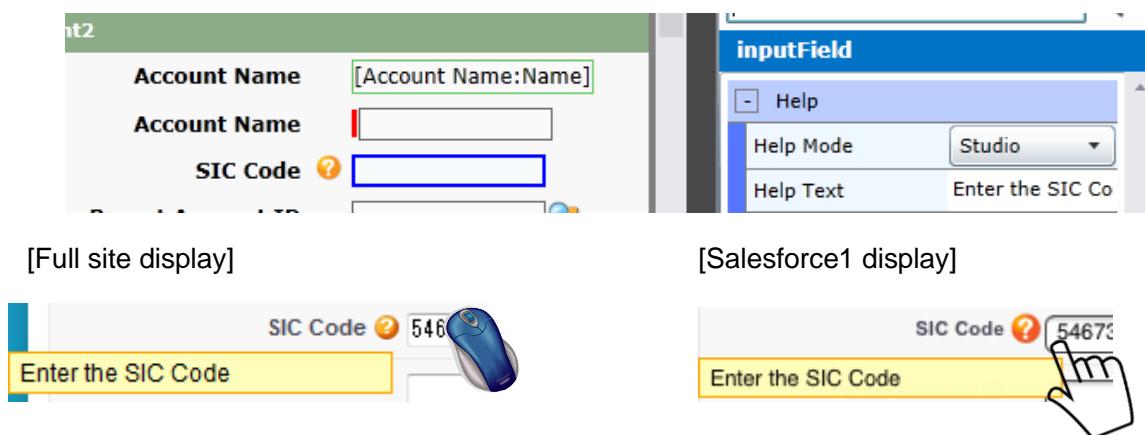
i. Help text and tool tip display.

[Help Text]

On the Full site display, mousing over the  icon will display a message but the Salesforce1 display requires the user to tap the icon to display the message

This functionality automatically changes when used in the Salesforce1 display.

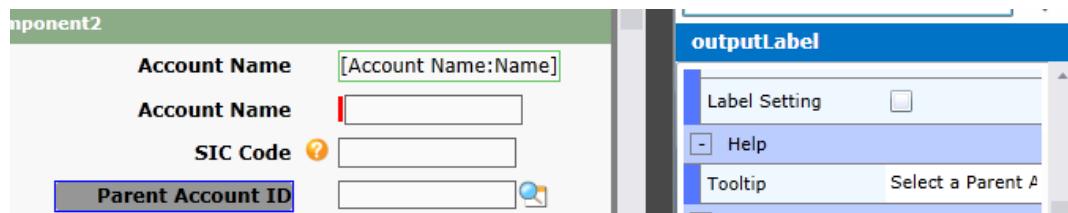
*Help text set on a table field cannot be used in the Salesforce1 display because it conflicts with the table sort functionality.



[Tooltip]

On the Full site display, mousing over the field will show the tooltip but the Salesforce1 display requires the user to tap the field to display the message. On the Salesforce1 display, the message will be shown just above the field label.

*Help text for buttons cannot be used in the Salesforce1 display because it conflicts with the button processing.



[Full site display]



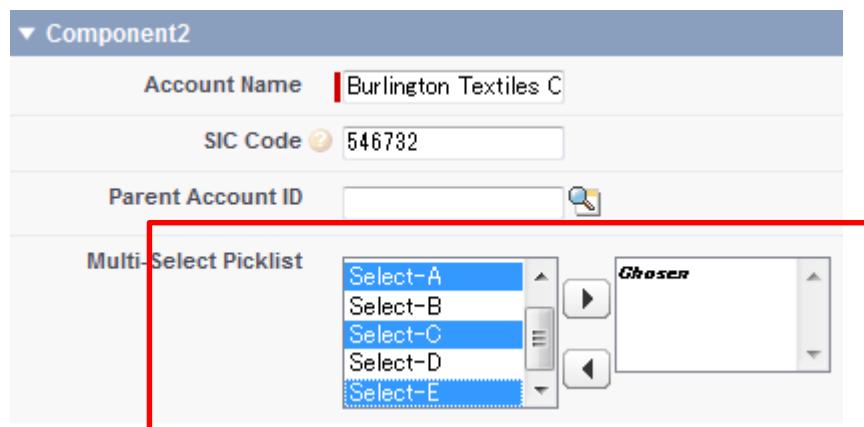
[Salesforce1 display]



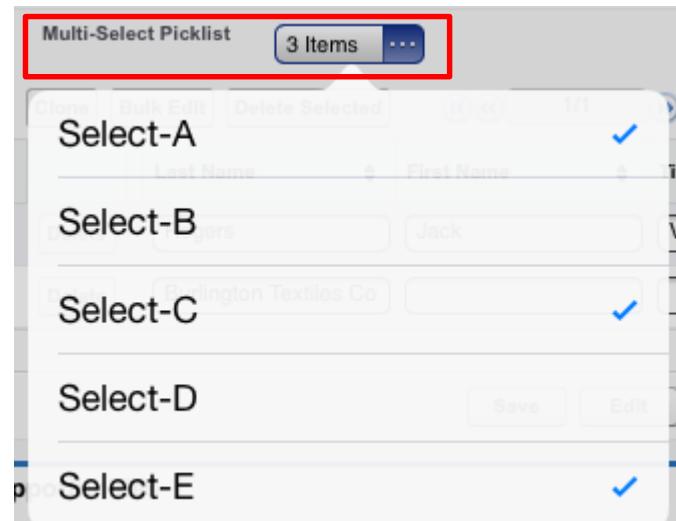
ii. Multiselect Picklists

Picklist (Multiselect) input fields are shown as a mobile specialized component on the Salesforce1 display.

[Full site display]



[Salesforce1 display]



*The above is how the component is shown on an iPad but it may differ per mobile device.

iii. Related Lists

When related lists are shown on Salesforce1, only the data records will be shown and buttons and links will be automatically hidden.

[Full site display]



Action	Opportunity Name	Stage	Amount	Close Date
Edit Del	GenePoint Lab Generators	Prospecting	¥ 500,000	2014/08/12
Edit Del	Edge Emergency Generator	Perception Analysis	¥ 2,000,000	2014/07/17
Edit Del	Aethna Home Products-	Id. Decision Makers	¥ 750,000	2014/07/11
Edit Del	Burlington Textiles Weaving Plant Generator	Id. Decision Makers	¥ 12,500,000	2014/07/11
Edit Del	Dickenson Mobile Generators	Proposal/Price Quote	¥ 30,000	2014/07/11

[Salesforce1 display]

Opportunity Name	Stage	Amount	Close Date
GenePoint Lab Generators	Prospecting	¥500,000	2014/08/12
Edge Emergency Generator	Perception Analysis	¥2,000,000	2014/07/17
Aethna Home Products-	Id. Decision Makers	¥750,000	2014/07/11
Burlington Textiles Weaving Plant Generator	Id. Decision Makers	¥12,500,000	2014/07/11
Dickenson Mobile Generators	Proposal/Price Quote	¥30,000	2014/07/11

iv. Details Panel component

On mobile devices (iPhone, iPad, Android) including Salesforce1, the Details panel component will only be shown on the Free Layout.

On the Salesforce Layout and Search template pages, the  button will be hidden automatically for the Salesforce1 display.

[Full site display]



<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name	First Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rogers	Jack
<input type="button" value="Delete"/>				<input type="button" value="Details..."/>	

[Salesforce1 display]

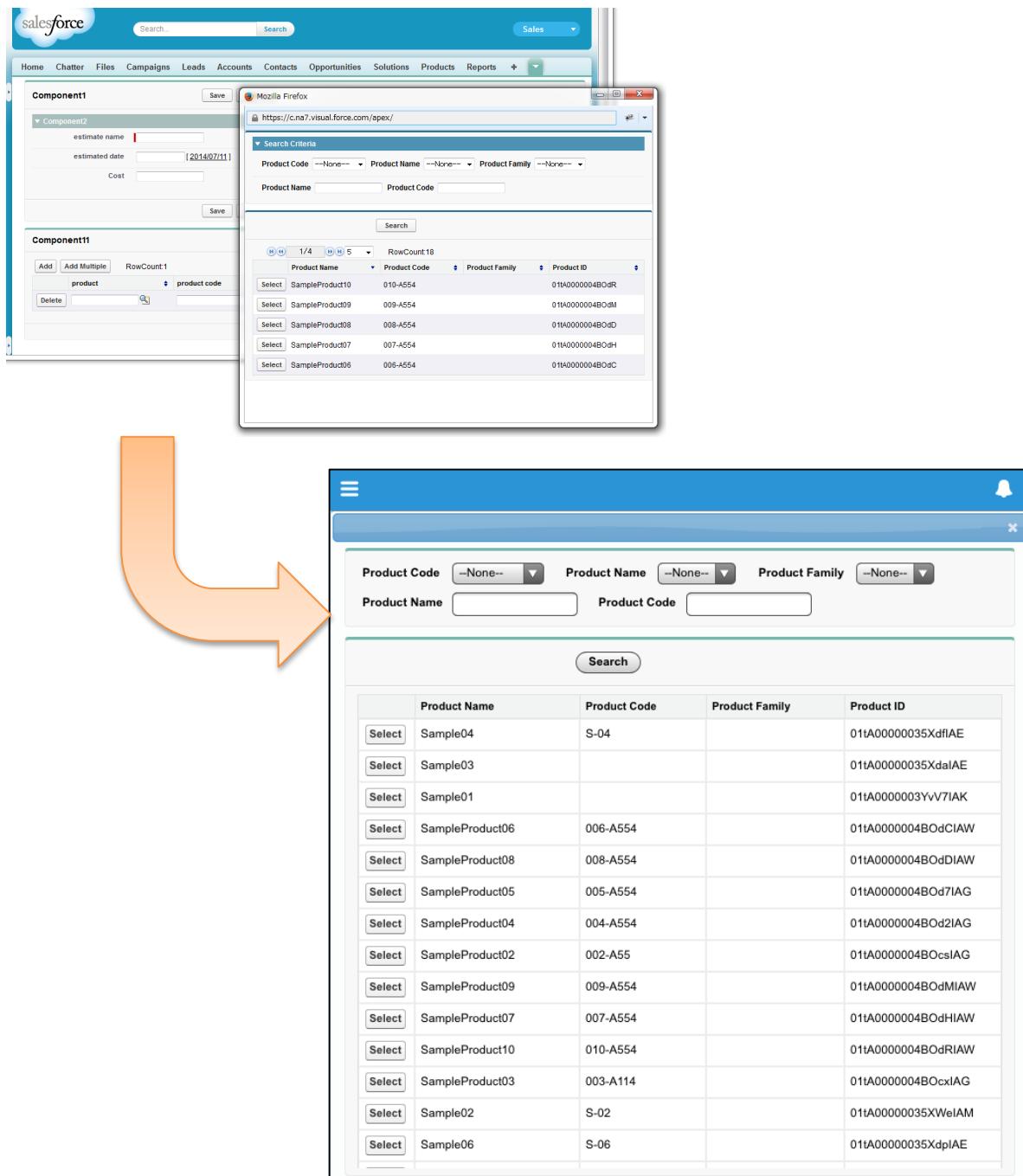
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Name	First Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rogers	Jack
<input type="button" value="Delete"/>				<input type="button" value="Details..."/>	
<input type="button" value="Add"/> <input type="button" value="Clone"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Delete Selected"/> 1/1					

V. Custom Lookup template pages

When a custom lookup page is opened in Salesforce1, it will be shown in the current window and not opened as a popup.

Further, to improve performance, upon first opening the custom lookup the results will not be already populated.

On Salesforce1, “Paging”, “Sorting”, and “Fix header” functionality is unavailable.



vi. Fixed Table headers

The “Fix header” property for DataTables, Multirow DataTables and Merged Activity tables allows the header of the table to be fixed in place.

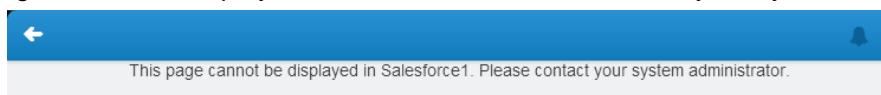
When displaying these tables in Salesforce1, the header will only be fixed in the below conditions.

- Android devices
- On iPhone and iPad devices, only when the data table is not set to match the page width
(Except when inside a details panel)

vii. Page Assignment template pages

Pages created with the page assignment template are not supported by Salesforce1. An error message like the below will be shown upon attempting to access such a page.

“This page cannot be displayed in Salesforce1. Please contact your system administrator”



viii. JavaScript page navigation

The sforce.one object is provided by Salesforce for salesforce1 page navigation (as of 2014/7/13)

http://www.salesforce.com/us/developer/docs/salesforce1/Content/vf_dev_best_practices_navigation.htm

SkyVisualEditor has provided a sample script for using the sforce.one object. For further information please refer to 5, 5-2 JavaScript Functions (P.311)

https://www.skyvisualeditor.com/help/skyvisualeditor_help_en.pdf

ix. Navigation Destination

This list shows correspondence with Screen Transition in Salesforce1 (Applications, Browsers) for buttons and links.

Note: Please be aware that salesforce.com does not officially support overwriting of the following actions on Visualforce Page: [Create New], [Edit], [Display], [Delete], [Copy], Standard Buttons, Standard Lists and Tab Control.

This section is cited from Salesforce document “Salesforce1 App Developer Guide” (P187) (as of 4th July, 2014)

http://www.salesforce.com/us/developer/docs/salesforce1/salesforce1_guide.pdf

Note: In Salesforce1, a separate window will not pop-up even if the “window open property” setting is turned on. The screen will slide to the new page.

○	Successful Screen Transition
△	Unexpected Movement (does not show error message)
■	Unexpected movement by location
✗	Does not meet the requirement (Error message will show)

(as of 23rd March, 2015)

SkyVisualEditor Property			Device	iPhone		iPad		Android	
			Display Style	Application		Application		Application	
			Overwrite Visualforce Page	No	Yes	No	Yes	No	Yes
Save button			—	○	○	○	○	○	○
Screen transition after Create New	View Screen	—	○	○	○	△※2	○	△※2	
	New Screen	—	○	○	△※4	△※4	△※4	△※4	
	Edit Screen	—	○	○	△※4	△※4	△※4	△※4	
	Visualforce Page	—	○	○	○	○	○	○	
	Custom URL	—	△※5	○	○	○	○	○	
	View Screen	—	○	○	○	△※2	○	△※2	
	New Screen	—	○	○	△※4	△※4	△※4	△※4	
	Edit Screen	—	○	○	△※4	△※4	△※4	△※4	
	Visualforce Page	—	○	○	○	○	○	○	
	Custom URL	—	○	○	○	○	○	○	
Delete Button			—	○	○	○	○	○	○
	Screen transition	New Screen	—	○	○	△※4	△※4	△※4	△※4

	after Delete	Visualforce Page	—	○	○	○	○	○	○		
			Custom URL	—	○	○	○	○	○		
Edit Button			—	△※5	○	○	○	○	○		
Cancel Button			—	■※1	■※1	■※1					
Copy Button			—	△※2	△※2	△※2	△※2	△※2	△※2		
Custom Link	Specify Destination	View	Same Window	○	○	○	○	○	○		
			Separate Window	○	○	○	○	○	○		
			New	Same Window	○	△※3	○	△※3	○	△※3	
				Separate Window	○	△※3	○	△※3	○	△※3	
			Edit	Same Window	○	○	○	○	○	○	
				Separate Window	○	○	○	○	○	○	
			Visualforce	Same Window	○	○	○	○	○	○	
				Separate Window	○	○	○	○	○	○	
			Custom URL	Same Window	○	○	○	○	○	○	
				Separate Window	○	○	○	○	○	○	
Custom Button	Specify Destination	Look Up	Same Window	○	○	○	○	○	○		
			Separate Window	○	○	○	○	○	○		
		New	Same Window	○	△※3	○	△※3	○	△※3		
			Separate Window	○	△※3	○	△※3	○	△※3		
		Edit	Same Window	○	○	○	○	○	○		
			Separate Window	○	○	○	○	○	○		
		Visualforce	Same Window	○	○	○	○	○	○		
			Separate Window	○	○	○	○	○	○		
		Custom URL	Same Window	○	○	○	○	○	○		
			Separate Window	○	○	○	○	○	○		
Name Field	Show as Link	Same Window	○	○	○	○	○	○	○		
		Separate	○	○	○	○	○	○	○		

		Window						
Lookup Field	Same Window	<input type="radio"/>						
	Separate Window	<input type="radio"/>						

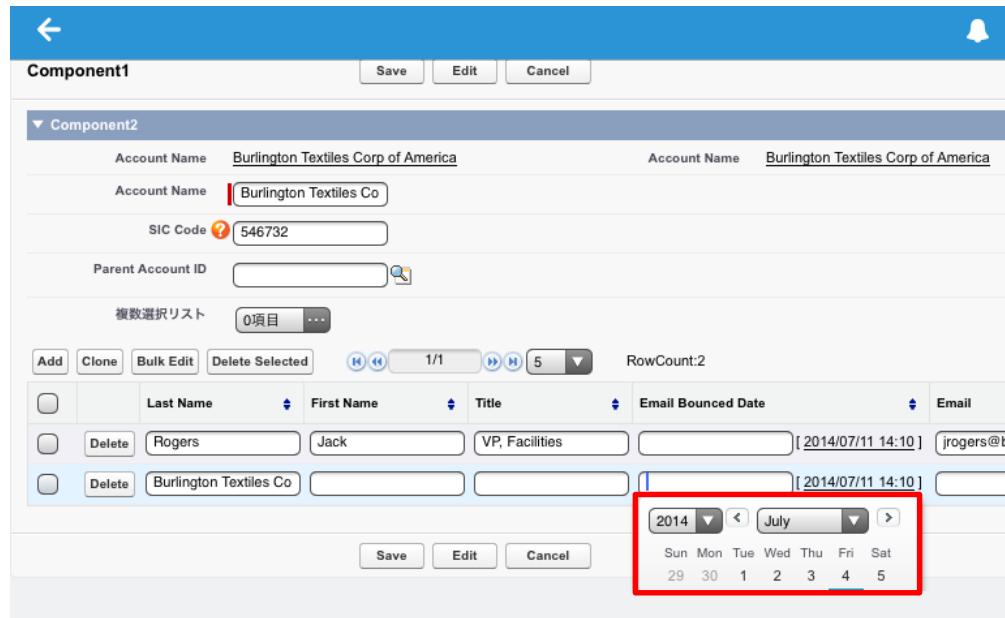
- *1: When a cancel button (that is placed on a page set by the Visualforce Page Tab in Navigation menu) is clicked, the page cannot return to the user's landing page (browsers are supported)
- *2: Open a browser in full screen (data will be migrated to the new window)
- *3: The page will transfer to a Salesforce1 standard page, not to an overwritten Visualforce page.
- *4: When the page is saved, a page after Salesforce login will display.
- *5: The specified page will display as a pop-up. Once the page is closed, a blank page will display.
- *6: The specified page will display as a pop-up. Once the page is closed, the previous page will display.

b. Screen Development Points

i. Using Date Fields

On the iPad and iPhone, dialogs cannot be shown beyond the realm of the body section so the date picker will be cut off as below. (As of 2014/07/13)

Therefore we recommend to place date fields away from the bottom and right side of the screen.



ii. Displaying fields as links

When putting a link field in a page block section on the second line or lower, it has been confirmed that on the iPhone the link will not trigger a transition 100% of the time. (As of 2014/07/13)

Therefore we recommend only placing link fields in the first row of a page block section.

iii. Screen size on Android devices

Android devices cannot scroll horizontally so we recommend designing screens that are only 1 screen width wide and place your fields and components on the left side of the screen. (As of 2014/07/13)

The item view may not be updated on a Standard page when it is edited and saved on the Edit page

Due to limitations with the Salesforce1, the page will not be refreshed when the record is updated by Visualforce (as of Nov. 1st, 2014).

If so, swipe the screen to reload the page.

An alternative approach to update the record would be to create Actions for mobile.

How to create Actions:

Go to [Settings] -> [Application Settings] -> [Customize or Create] -> [Object]. Find and select "Button, Link and Actions" from Target Object.

Click "New Action" on the Setting page, and input appropriate values in the items as follows:

- Types of Action: update record
- Input value in Display Label and Display Name.

After creating the Action, display it on the target page layout. Please refer to the help below for more information on how to create Object-Specific Quick Actions

https://help.salesforce.com/HTViewHelpDoc?id=creating_object_specific_actions.htm&language=en

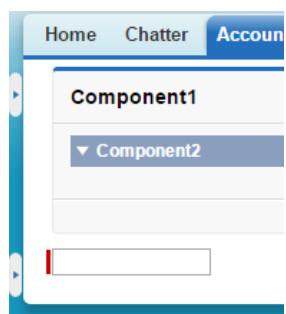
iv. To use Data Table in Free Layout

Set the "Set the height" property off. If the setting is turned on, the table may be hidden when the number of the rows exceeds the height setting. (as of March 1st, 2015)

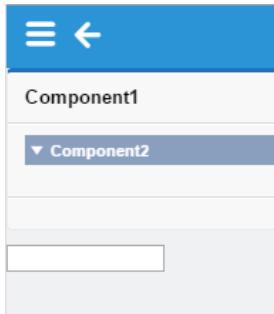
v. Required field does not get marked as required when placed directly on under the canvas.

A required field does not get marked as required when placed directly on the canvas. Please place it within the component (Page Block Section, Panel Grid, etc) to resolve this issue.

[Full Screen]



[Salesforce 1]



vi. Unable to display PDF pages on mobile device.

There are reports of PDF Visualforce pages not rendering correctly on iOS & Android devices.

Please check the below link for "Known Issues" on Salesforce help. (as of April 7th, 2015)

https://success.salesforce.com/issues_view?id=a1p3000000T4isAAC